

D.A. Sparkes Accounting P.C 2023 Tax Year ~ Personal Income Tax Intake

1. **Name(s):** _____
Date Received: _____
2. Returning / New
3. Legal Name(s)/Middle Names: _____
4. Social Insurance Number (SIN): _____
5. Date of Birth: (MM/DD/YYYY) _____
6. Address: _____
7. Marital Status: _____ **date if changed** _____
8. Dependent Information: (Full Names, Sex, DOB, SIN) _____

9. Email Address: _____ FOR TAX RETURNS?
10. Contact Phone Number: Home _____ Cell _____ TEXT?
Complete: Yes / No Missing Info: _____
11. First Time Home Buyer? Y / N

New/ Changed Client Info:

12. Change of Address, Dependents, Phone #, email, marital status as of December 31st, 2023, Y / N (if yes, please list changes)

13. Sell a house in 2023? (Purchase price, address, year acquired, selling price, date)

14. Do you authorize CRA to provide your name/email to Ontario Health to contact/send information to them, about organ/tissue donation? Y / N / NA
15. Work from home? 50%+ (Need detailed receipts) Y / N / NA
16. Detailed work from home T2200 Y / N / NA
17. Digital News Subscription Receipts Y / N / NA
18. Tuition T2202 Receipts & Student Loans Interest Y / N / NA
19. Educator School Supply Credit for Teachers/ECE (K-12) Y / N / NA
20. Format of Tax Return: **Paper Summary / Email PDF (full)**
21. Do you have any questions/concerns you would like addressed:

-Rent/Property Taxes _____ (<\$45,000 & seniors)

Business (if applicable)

Name: _____

Business HST Filed by us? Yes No

Processed: _____

Contact/Appt: _____

Fee: _____

Ready to e-file Filed

Invoiced: _____